INVESTIN what's NEXT

CollegeCounts^M
Alabama's 529 Fund

BIG



Educate and familiarize the people of Alabama with the value, flexibility, and accessibility of Alabama's 529 plan

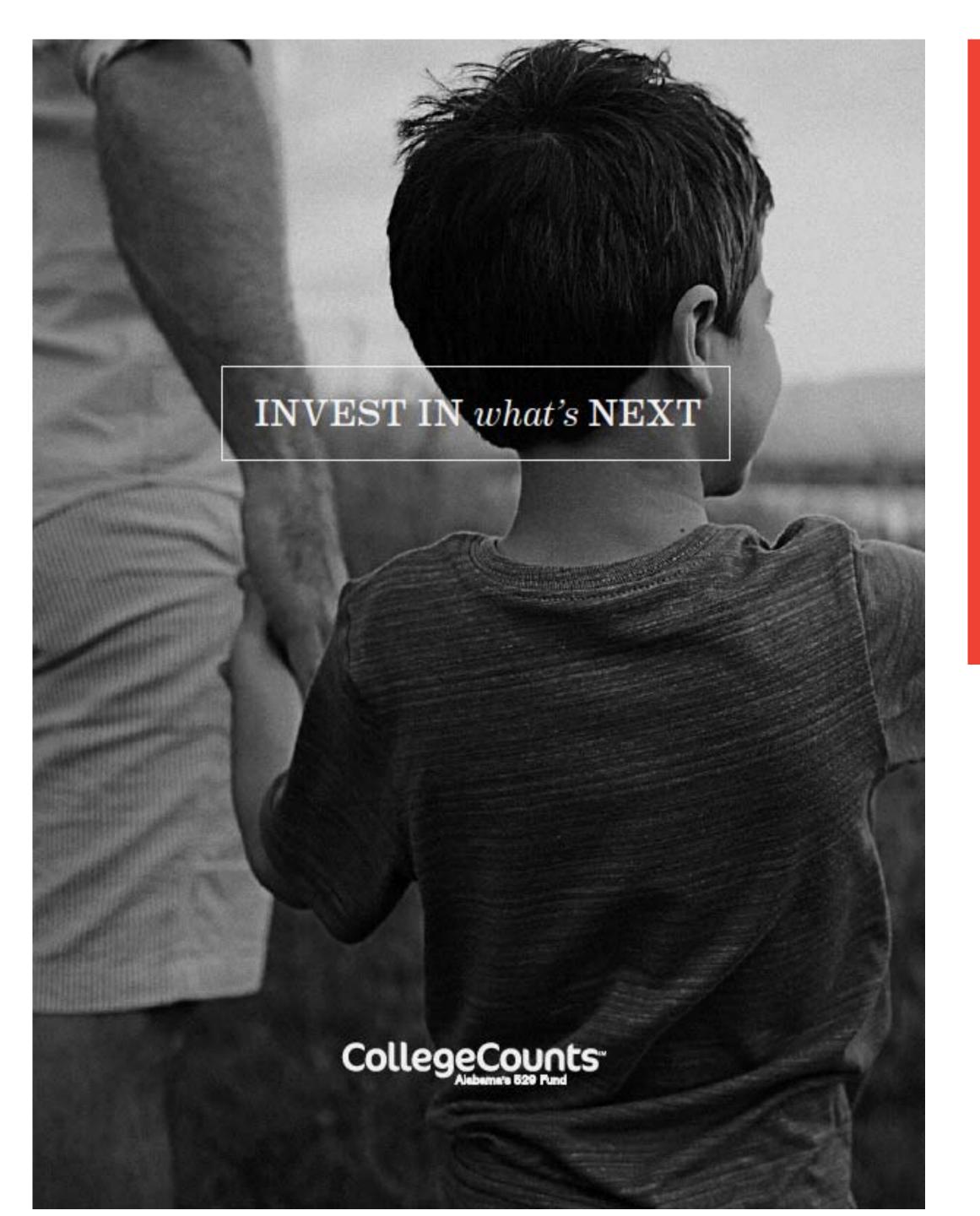


TONE & MANNER

tell not sell friendly not fun encouraging not judgmental educational not academic simple not easy investment not purchase legacy not history

CREATIVE





INVEST IN what's NEXT

50 WHAT'S NEXT?

PORTFOLIO OPTIONS

TAX ADVANTAGES

EDUCATION PLEXIBILITY THE ECONOMICAL CHOICE LIFETIME INVESTMENT

STICKER SHOCK: THE PROJECTED COST OF COLLEGE (4 YEARS)* PUBLIC TODAY SYEARS 10 YEARS 15 YEARS. The cost of a four-year college degree could escalate to a staggering level. Be ready when it's time for your child to enter college.



JUST the FACTS

WHAT ARE THE TAX BENEFITS?

- Alabama state income tax deduction for contributions:¹
 - Up to \$10,000 if married filing jointly
 - Up to \$5,000 for Individuals
- Tax-deferred growth¹
- Tax-free withdrawais for qualified college expenses²

WHAT ARE QUALIFIED EXPENSES?

- Tultion
- · Fees
- Supplies
- Equipment
- · Books
- Room and board (must be enrolled at least half-time)

WHAT SCHOOLS QUALIFY?

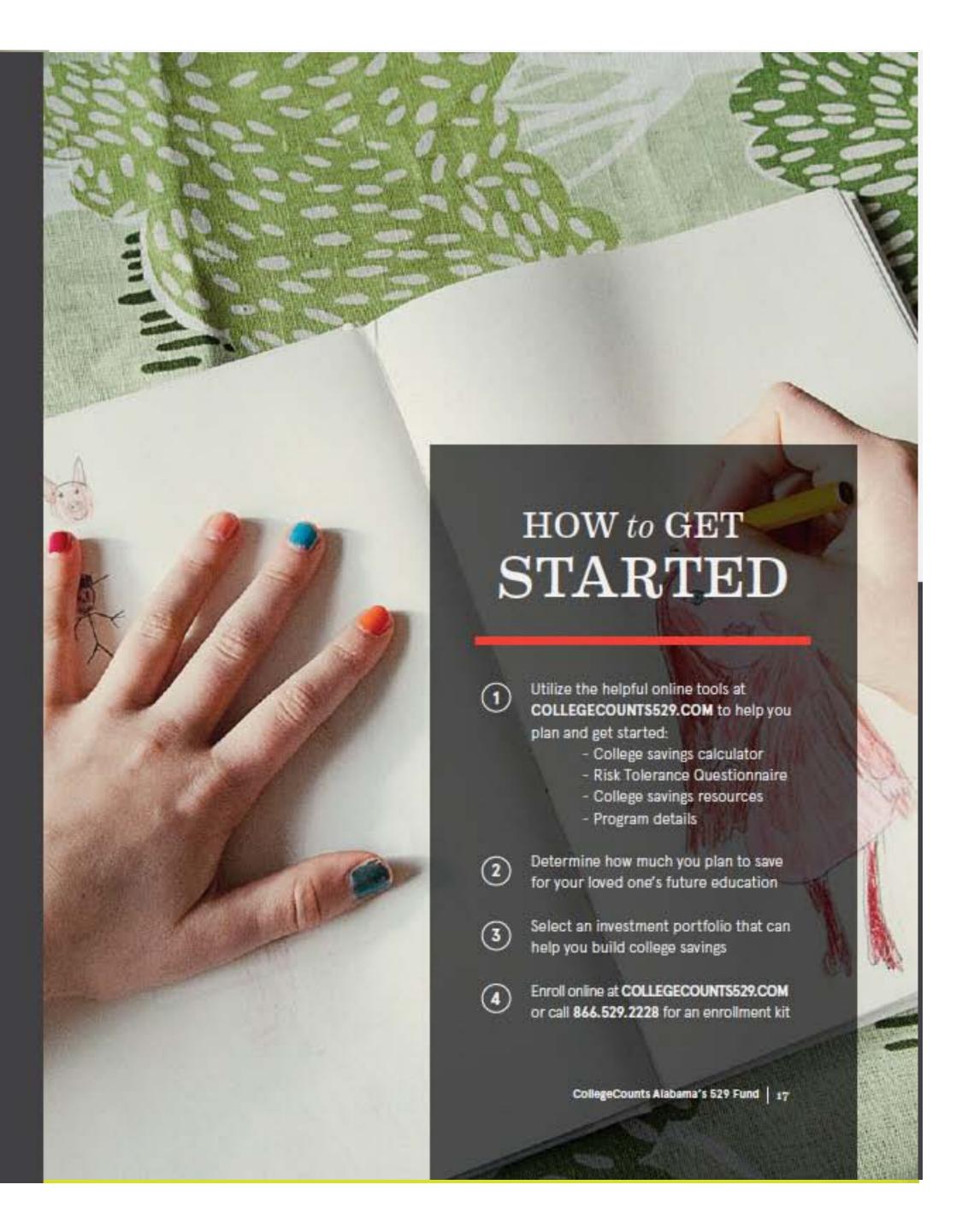
- Any accredited postsecondary education institution
- Public and private colleges and universities
- Two-year vocational, trade, technical and professional schools
- Alabama schools, national schools and some foreign schools

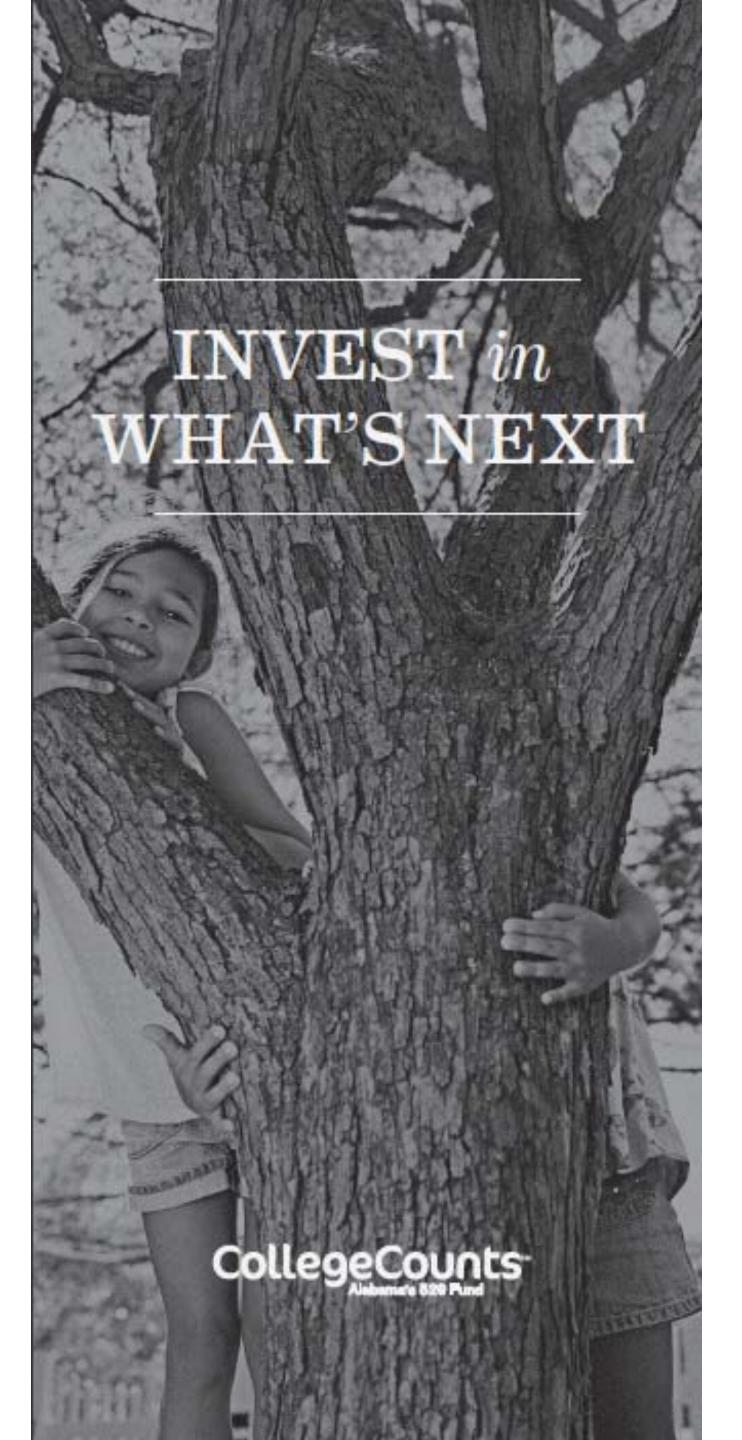
HOW CAN I CONTRIBUTE?

- Send a check
- Estabilish an automatic investment plan
- Roll over funds from another 529 plan
- Establish a payroll deduction at work
- Transfer reward dollars earned with a CollegeCounts 529 Rewards Visa® Card
- Invite family and friends to contribute to your account through GiftED—our online giving service.

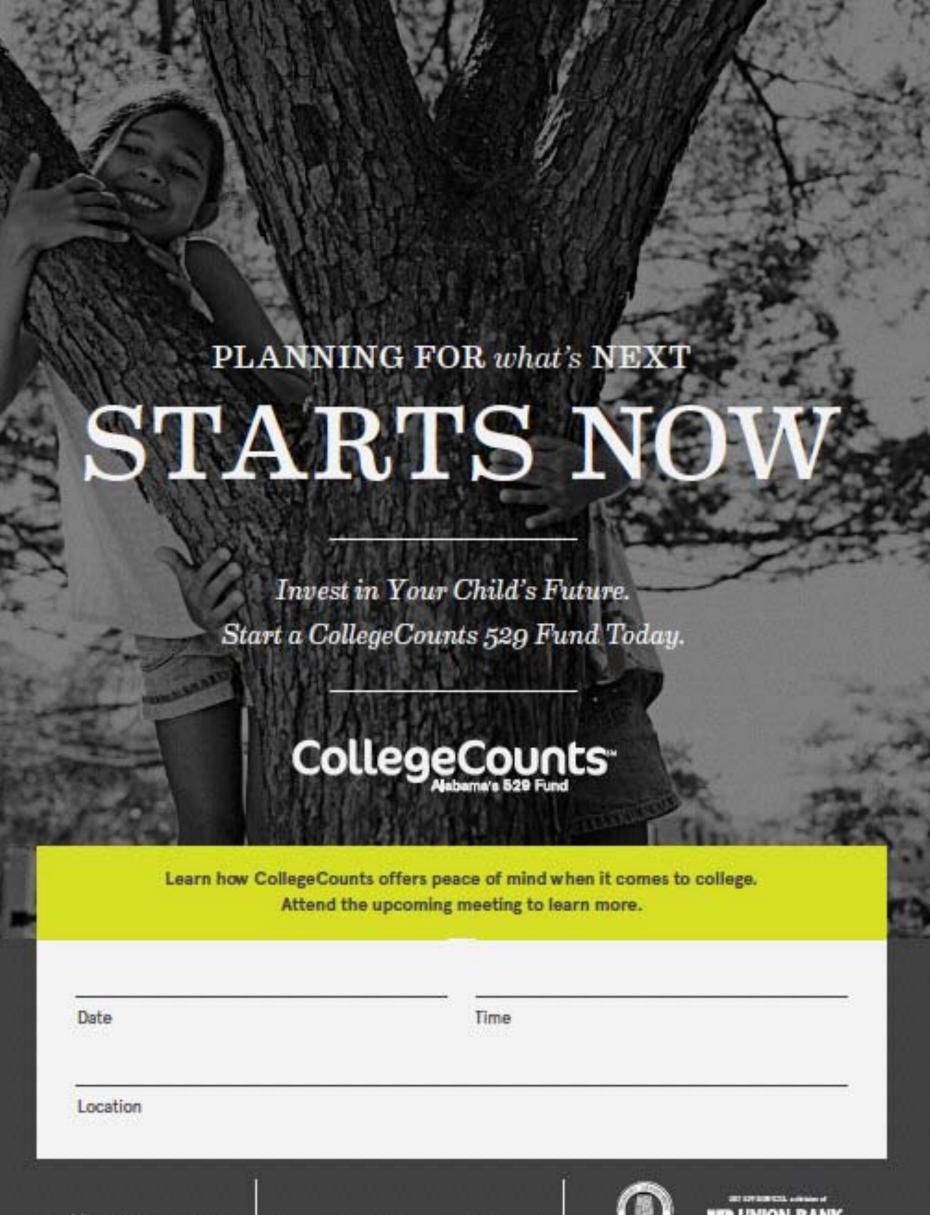
WHO CAN CONTRIBUTE?

Parents, grandparents, relatives and friends—anyone can contribute on behalf of the beneficiary





COLLEGE STICKER SHOCK* JUST the FACTS You've loved them, led them, played with them, planned for them and taught them everything you know—everything they need to grow up A smart, simple investment. Alabama residents can earn and become the individuals they were created considerable tax benefits - up to \$10,000 for married to be. You've taught them to dream big and stop couples and \$5,000 for individuals. Investments can short of nothing but their best. grow tax-deferred, and investors can make tax-free withdrawals for qualified college expenses.2 Age-Based Portfolios, Target Portfolios and Individual PUBLIC Fund Portfolios allow you to select investments ideal for you. The CollegeCounts 529 Fund features underlying funds from respected mutual fund families for enhanced choices and diversity. WHAT'S NEXT? Vanguard TRowePrice OFidelity PIMCO
Dorde & Cox Forest Dimensional The CollegeCounts 529 fund can be used nationwide at most accredited universities, colleges, trade PRIVATE schools and even graduate schools. The CollegeCounts 529 Fund makes it easy for parents, grandparents, family and friends to TODAY 5 YEARS 10 YEARS 15 YEARS invest in the next generation. The program is FUNDS CAN BE USED FOR: simple, offers significant tax advantages, requires The cost of a four-year college degree could escalate to a no minimum contribution and allows easy to set Tuition and Fees staggering level. Be ready when it's time for your child up automatic contributions. Room and Board (must be enrolled at least half-time) to enter college. Books Source: The College Board—Trends In College Pricing 2013. Estimates based on 2013-2014 inflation-adjusted tuition, fees and room and board TO LEARN MORE, VISIT College Counts 529.com · Required Equipment for Enrollment for 4 years. *Includes tuition, fees and room and board. Assumes an



CollegeCounts

CallegeCounts529.com (866.529.2228





NOT FOIC INSURED I WAY LOSE VALUE I NO BANK GUARANTEE

The Callege Counts S.W.Fundi or qualified his formar agreements Section S.W.d. their stand Revenue. Cooks that its of an all by the State of Austrana, administered by the Roard of Trustees of the ACES Trust Fund dhe "Trust" and plan issues, manifested on the Callege Counts S.W. und, and Union Bank & Trust Company serves as Program Manager. Accounts and insulments under the Callege Counts S.W.Fundian excit reserved or your anised by the FOIC. The State of Alabama Trustees of Trust and Roard the Trust the Program. Online State & Trust Company or any other selfly the administrator or a real guaranteed and you could be seeing by the selfing in the Plan.

Anile exter should conside the investment objective, risks and other yes and expenses associated with the Program Select elimenting. This information is contained in the Program Disclosure Statement. If econs and it contains the select ending For a copy, visit Codage Counts 21 come or coll 845 C78 2276.

I you are not anticharm topopy, consider before in oring whether your or the designated beneficiary's home date of eracey date to or other benefits that are only and date for investments in such details conflict that are not provided to the conflict that are not the conflict that are not to the conflict t



There has never been a better time to visit with clients who currently save with out-of-state 529 plans. It's possible that a rollover to the Alabama CollegeCounts 529 Fund would be advantageous. It's time to invest in what's next.

IMPORTANT FACTORS TO CONSIDER

BENEFITS	COLLEGE	ETHER KEP PLANE
\$5,000 individual/\$10,000 joint Alabama state income tax deduction (rollovers are aligible)	~	NO
No sales charges or fees to rollover	~	\$
Quality investment funds	~	ş

WE can HELP

CollegeCounts has the tools and resources to help you walk through the benefits of rollovers with your clients.

ROLLOVER EXPRESS FORM-A COMBINED ENROLLMENT AND ROLLOVER FORM TO REDUCE PAPERWORK.

TAX G&A—AVAILABLE IN THE TAX RESOURCES SECTION OF COLLEGECOUNTS529.COM.

- "The CollegeCounts 529 Fund is a good choice for Alabama residents and for do-it-yourselfers. The agebased portfolios in the plan invest in high-quality funds."
- "Where this plan sets itself apart is with its broad lineup of well-run individual options. Of that set of 20 investments, 17 are rated by Morningstar analysts, and all of those receive Gold or Silver ratings. The majority are Vanguard index funds providing exposure to various asset classes."
- "Alabamians benefit from a \$5,000/single or \$10,000/joint income tax deduction on contributions..."
- "Local college-eavers will find plenty to meet their needs here."
- -MORNINGSTAR, OCTOBER 2013

CollegeCounts

CollegeCounts529.com | 866,529.2228

WHEN YOU INVEST WITH US, you got access to those quality fund managers



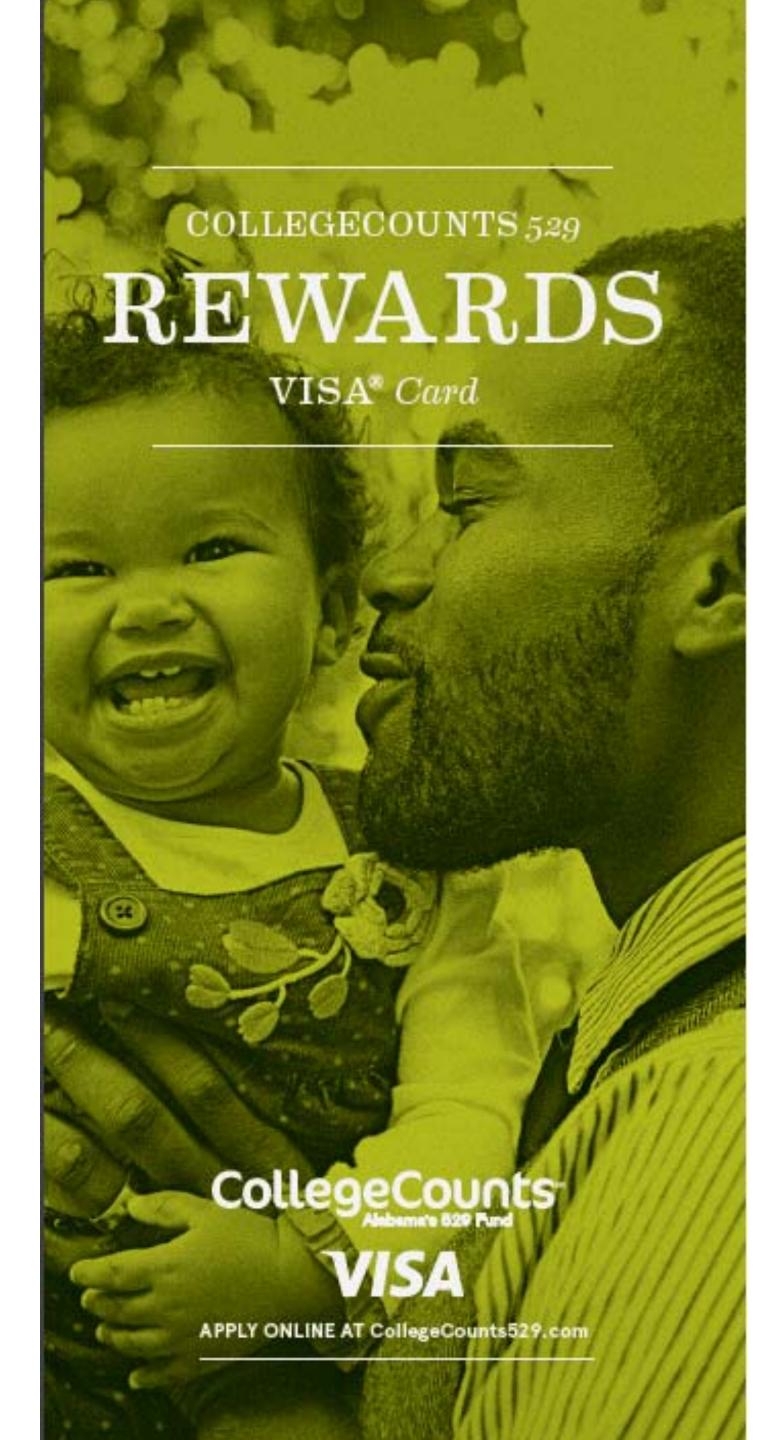






Descr & Cox Funser











Alabama Dining



Alabama's Best BBQ Ribs Round 2: Time is running out to vote for your favorite

Bob Carlton | bcarlton@al.com



Something new in Lakeview, and one of America's best pizzas: here's the Birmingham food beat rewind



Two days ago Bab Carlton | bearlton@al.com

83% of Americans want to keep the Washington Redskins name WATCH SUPPORTER VIDEOS

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AdCholoes





LEARN MORE ABOUT ALABAMA'S 529 COLLEGE SAVINGS PLAN



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Tory Johnson's Tips for Maintaining Weight Loss 1

Year Later

Author of national bestseller "The Shift," Johnson shares how she lost nearly 80 pounds and kept it off.

03:10 1 09/05/2014



RELATED LINKS:

- WATCH: Women's Weight-Loss Secret. Hypnosis
- WATCH: Study Links Weight Loss and Unhappiness
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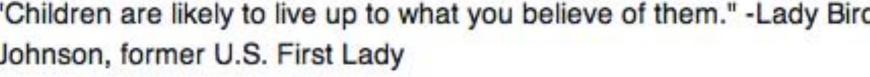
COMING UP		
9:15 AM ET	News Pop	remind me
9:30 AM ET	Opening Bell	remind me
10:00 AM ET	News Pop	remind me
10:30 AM ET	Headlines & Weather	remind me
10:45 AM ET	ESPN on ABC News	remind me



SOCIAL MEDIA



"Children are likely to live up to what you believe of them." -Lady Bird Johnson, former U.S. First Lady





CollegeCounts - Alabama's 529 Fund

Posted by Kammie Kasten [?] - August 13 - Edited [?]

Personal investments are just that - personal. And number of investment options just right for your pe

CollegeCounts - Alabama's 529 Fund

Posted by Kammie Kasten [?] · August 1 · Edited [?]

We save for their future, whatever that may be, but what exactly are your kids and grandkids dreaming of for their future? Teacher, lawyer, contractor or artist, share with us what you're saving for.



Not sure what kind of it short quiz to find out w



Like - Comment - Share

CollegeCounts 529 I Risk Tolerance Questionnaire

www.collegecounts529.com

Choose from a variety of college savings investment portfolios backed by quality fund families such as Vanguard, T. Rowe Price, PIMCO, and Fidelity.



Like - Comment - Share



913

Since 5/1/14

PUBLIC RELATIONS

HIGHLIGHTS

- 1. David Kassouf, CPA: Op-Ed on AL.com
- 2. Treasurer Boozer Byline "Saving for Your Baby's College" Kids Life Magazine & River Region Magazine
- 3. College Savings Month Coverage WEAC Anniston
- 4. Treasurer Boozer Byline "Alabama's 529: Reap Tax Benefits While Saving for College" Potential Magazine
- 5. Upcoming Statewide Media Tour with Treasurer Boozer Huntsville, Birmingham, Montgomery, Dothan, Mobile

HIGHLIGHTS

5,286,726 impressions from <u>digital advertising</u> resulting in 3,767 clicks to the CollegeCounts website

112,824 impressions from search engine marketing resulting in 1,841 clicks to the CollegeCounts website

534,048 impressions from <u>paid social media advertising</u> resulting in 1,748 total engagements

